



Procurement & Contract Services Updates

Presented by:

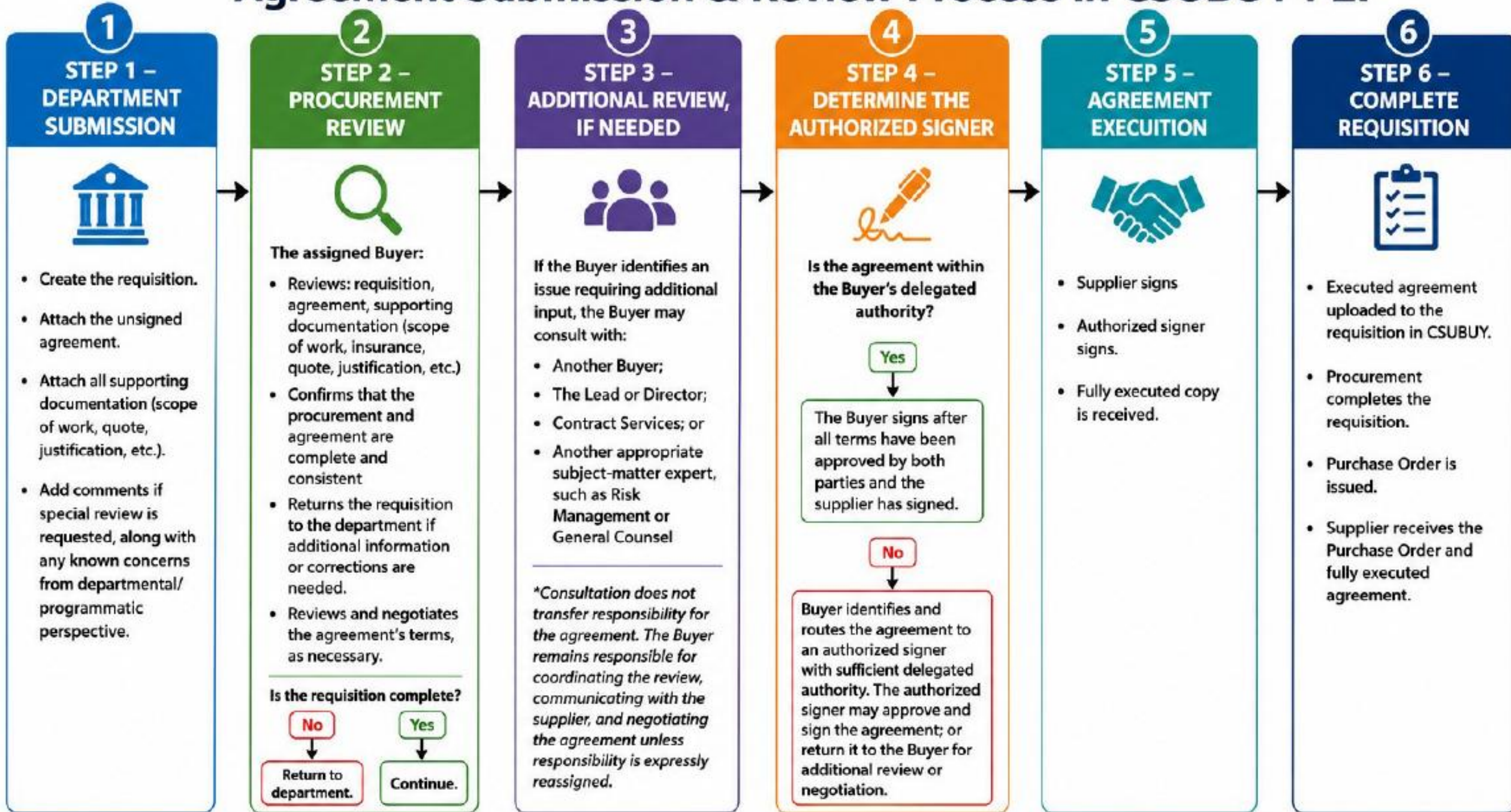
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Topics

- **CSUBUY P2P**
 - Agreement Submission with a Requisition – **Sebastian & Kathleen**
 - New Vendor Requests / Vendor Tie to Campus – **Sebastian**
 - After-the-Fact Requisition Requirements – **Kathleen**
 - Use of Commodity Codes beginning with “7” – **Kathleen**
 - Use of Account Overrides – **Sebastian**
- **CONCUR/ProCard**
- **Optimize Ticket Process**
 - CSUBUY P2P – **Kathleen**
 - ProCard – **Sebastian**
- **What's New**
 - NEW: OnBase Contract Request Submission Platform - **Kathleen**

Agreement Submission & Review Process in CSUBUY P2P



Vendor Management in P2P

With the implementation of CSUBUY P2P, campuses can no longer manage supplier-related tasks, intervene on behalf of suppliers or departments, or contact P2P Administration regarding supplier management. For supplier assistance, campus stakeholders should submit an Optimize ticket, which will be escalated to CO-level support. Suppliers experiencing onboarding issues should follow CO guidance or contact CSU Supplier Resources directly.

- **Supplier-related tasks managed solely by the CSU Chancellor's Office:**

- Addition of new supplier to P2P
- Tying an existing supplier to Sacramento State
- Correcting erroneous supplier information in the system
- Providing feedback related to supplier-related submissions

Campus departments cannot provide support to suppliers in response to an email

After-the-Fact Requisition Submissions

- **Direct Payment Requests (DPRs)** were discontinued in early February 2026. After-the-fact transactions are now processed through a requisition and must be identified by entering "**After-the-Fact**" in the **Reference** field.
- **As required under the prior DPR submission process, the requester must attach a Justification Memo to the requisition that includes the following information:**
 - Description of the circumstances that caused the after-the-fact transaction
 - A remediation to prevent like situations from occurring again in the future
 - Signature from the department MPP/Approver

Failure to provide a complete memo will result in the requisition being returned to the requester

Appropriate Chartstring Coding in P2P

- **Use of Commodity Codes beginning with “7”**

- Commodity Codes beginning with 7 are specific to Restricted Use Direct Pay transactions only.
- Select the most applicable commodity code **from the available folders** 
- *Anything else except for Direct Purchase or Inactive-Do Not Use*

- **Use of Account Overrides**

- Override use for generic tracking purposes is prohibited
- Overrides for goods or services that are not auto-populated in the account field are ok
- Generic override codes (e.g.: 660856_SACST Supplies & Services Detail #4) will be deactivated

- ▶  Capital Projects
- ▶  Equipment
- ▶  IT
- ▶  Leases/Rentals
- ▶  Maintenance, Repair, and Operations
- ▶  Misc. Other
- ▶  Non-Recycled Items
- ▶  Fuel
- ▶  Hospitality
- ▶  Recycled Items
- ▶  Services
- ▶  Supplies
- ▶  For Library Use Only
- ▶  Direct Purchase
- ▶  Inactive - Do Not Use



CONCUR for ProCard Holders

All ProCard Holder Accounts Have Been Migrated to CONCUR

- Procurement Card requests and increases are now to be submitted to Concur.
- Procurement Card inquiries & authorizations are to be submitted as Optimize tickets.
- As of the Concur implementation, changes to department and approving official are being overseen by HR.
- **Statement reconciliations must be completed by the end of the monthly card cycle (typically the 23rd of the month)**

OPTIMIZE Ticket Process

Optimize centralizes stakeholder inquiries into a single platform, providing a consistent and efficient process for submitting requests, tracking progress, and receiving timely support.

- **CSUBUY P2P**

- ✓ Procurement Team coverage rotates by schedule
- ✓ Campus resolves tickets when possible
- ✓ Escalate to CO when additional support is needed

- **PROCARD**

- ✓ Optimize launched with CONCUR for inquiries
- ✓ ProCard Program Specialist provides primary support
- ✓ Escalate as needed for additional assistance

As Optimize and other support channels are implemented, Procurement is transitioning away from email, phone, and other informal methods of communication. Continued use of these channels may result in delayed responses or missed requests, as they will no longer be monitored regularly. Stakeholders should use the designated support channels to ensure timely and reliable service.

What's New?

OnBase Contract Request Submission Platform

What to Expect:

➤ Centralized Intake

- All contract and agreement requests (not related to a P2P requisition or Procard request) must be submitted through the OnBase Contract Services

➤ Request Form

- Email submissions will be redirected to the form to ensure proper tracking and processing
- Requests must include all required information and supporting documentation. Incomplete requests may be returned for revision prior to processing

➤ Status Updates

- Requestors will receive automated email updates as requests progress. Please rely on these updates rather than submitting status inquiries

➤ Reminder . . .

- Requests are processed based on queue order and complexity. Turnaround times vary depending on complexity and volume (refer to our website service levels and expectations).

Questions?

